Session 8: Module 4 - View Appointments for Date	
SCRIPT	
Description	**Text**
1. Introduction	**Welcome** to M-SPIRIT **Session 8, Module 4**, of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	View Appointments for Date
3. <view>	In this module, we are going to take a look at the daily schedule.
	The daily schedule can only be accessed from the Participant Search/List screen…
	...via the Activities menu. Click the menu.
4. <view1>	Select View Appointments for Date.
5. <view2>	<no script>
6. <view3>	The View Appointments for Date screen opens to the current date.
	Just like the other calendars for appointment scheduling, the current date is highlighted in green.
	The date selected in the calendar displays above the grid.
	...which is blank since there aren't any appointments scheduled for today.
	We can advance the calendar to view future months by clicking on the forward (>) arrow.
	Go ahead and click the arrow.
7. <view4>	And we can click the back (<) arrow to view previous months.
	Click the back arrow to return to December.
8. <view5>	Let's select December 9 on the calendar to view the schedule for that date.
9. <view6>	The clinic defaults to the clinic we are working in but we can view the schedules for other clinics in our agency by selecting a different clinic from the Clinic drop-down.
	The date stays consistent when switching between clinics.
10. <view7>	We can also change our view so that we are only looking at a schedule for a particular resource by selecting a different one from the Resource drop-down.
	The default is always All Resources.
11. <view8>	The Household Information section displays the highlighted participant's name, date of birth and WIC status (or category).
	We'll take a look at the grid itself in a minute.
	Let's take a look at the buttons next.
	Click the Print Schedule button.

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12. <view9>	The schedule is immediately sent to the printer.
	It lists all appointments by time and includes the participant's State WIC ID, Household ID, Name, Status or Category and the Type of appointment.
	It identifies the clinic at the top of the schedule…
	...and the date of the schedule along with the total number of participants that have appointments at the bottom.
13. <view10>	We can also print a schedule for individual resources.
	First, we have to identify which resource we want to print for.
	How do you think we do that?
	Right. We would have to select a Resource from the drop-down.
	Now click the Print Notice... button.
14. <view11>	This window should look pretty familiar by now.
	Clicking OK prints the appointment reminder letter for the participant currently highlighted in the grid.
	Click OK.
15. <view12>	Recognize this? As we are seeing, there are a lot of places within the system where this same appointment reminder letter can be printed.
16. <view13>	We can also reschedule appointments from this screen.
	Remember, the first step is to always identify the appointment we want to both delete and reschedule.
	Let's reschedule Mama's appointment since she is already highlighted.
	Click the Reschedule... button.
17. <view14>	Press Enter or click OK to select the Schedule Appointment button.
18. <view15>	Again, the Reschedule Appointments screen opens to the current date.
	Mama called to say she wouldn't be able to make it by 8:00 a.m. so we are just going to reschedule for a later time on the same day as long as we have an opening.
	Click on the 9th.
19. <view16>	<no script>
20. <view17>	This is the same screen as we saw when rescheduling from the Appointments tab.
	As we saw before, the original appointment information is listed at the top and the rest of the details are defaulted into the drop-down fields.
	Notice the Appointment Type is Initial Certification but her WIC Category is still Non-Breastfeeding.

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	Let's correct that. Click on the WIC Category drop-down.
21. <view18>	Select Pregnant from the list.
22. <view19>	Also, since Mama called to reschedule, let's select the By phone radio button.
23. <view20>	We have a couple of openings, and Mama is OK with the 11:00 appointment.
	Double-click on the 11:00 time slot under WIC 1 BM.
24. <view21>	Again, the confirmation verifies that we want to delete the appointment at 8:00 and reschedule for 11:00.
	Press Enter of click OK.
25. <view22>	Notice the 8:00 appointment has been deleted and the 11:00 appointment scheduled.
	Click the Close button…
26. <view23>	...which returns us to the View Appointments for Date screen.
	OK. Now let's take a look at the grid.
	We are sure you have already noticed the grid is default sorted by appointment time.
	We can change the sort order by clicking on the column header...
	...which may come in handy when trying to indentify members of the same household.
27. <view24>	Maybe we would want to see how many of each type of appointment is scheduled for the 9th. All we would have to do is click on the Appointment Type header and the column will sort based on type of appointment.
28. <view25>	The columns displayed on this screen include appointment time, State WIC ID, Household ID, name, appointment type, duration or length of the appointment, group topic, the member's primary language, a Confirmed checkbox and Kept checkbox, both of which we will discuss in a few moments.
	Let's see what else displays. Click the area to the right of the scroll bar.
29. <view26>	The Confirmed Date and Confirmed Comment, which are what exactly?
	Well, in M-SPIRIT you can document if and when reminder calls are made and any comments derived from the reminder call.
	Let's document a reminder call made for Mama Cookie, who is already highlighted in the grid.
	Click the Confirm button.

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30. <view27>	Mama's contact information is listed at the top of the Confirm Appointment window, including…
	...her address and telephone number.
	Once we've completed the reminder call, we can click the Appointment Confirmed checkbox.
	Click the checkbox.
31. <view28>	The current date auto-populates into the Date Confirmed field once the checkbox is selected.
	However, this can be modified if necessary.
	Comments are not required but can be added to indicate if a message was left or anything else that might be pertinent.
	It should also be noted that although a comment of any length can be written, only 30-35 characters can actually be viewed in the Confirmed Comment column on the View Appointments for Date screen.
	Click into the Comments field and we will type a quick comment.
32. <view29>	<typing>
	Guess what the Print Notice checkbox does?
	Uh-huh. Sends the same appointment reminder letter that we've printed in all the previous appointment screens we've reviewed so far to the printer.
	Let's skip it this time and just click OK.
33. <view30>	So, let's see what displays in the grid once an appointment has been confirmed.
	Click on the area to the right of the scroll bar so that we can see all of the columns affected by the Confirm function.
34. <view31>	A checkmark is automatically entered into the Confirmed column…
	...and the Confirmed Date and Confirmed Comment are both displayed.
35. <view32>	We can mark an appointment as kept at any time by selecting the appointment in the grid and clicking the Update Kept button.
	Since Mama Cookie is already highlighted, let's click the Update Kept button.
36. <view33>	A checkmark is automatically inserted into the Kept column.
37. <view34>	Notice the High Risk indicator in the Household Member Information section.
	When a participant is high risk, this indicator automatically displays when the participant's record is selected in the grid.

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38. <view35>	The Kept indicator is also displayed in the Appointments tab of the participant folder.
	We can multi-select records for the Update Kept function.
	The multi-select rules in this screen are the same as any Windows program.
	Just hold the Ctrl key down to select individual records.
	We can also hold the Shift key down when clicking but it will select all records between the first click and the second click.
	Just remember, the Ctrl key gives you more control over the records selected.
39. <view36>	
	Appointments can also be deleted from this screen.
	Deleting an appointment in this screen will delete it from all other appointment screens, such as the Appointments tab and Schedule Appointments.
40. <view37>	Last thing we need to note about this screen is that it cannot be minimized and the Participant Search/List screen cannot be accessed while it is open.
	The Close button closes this screen.
41. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Questions forum on the Montana WIC website.